

# **U.S. Department of Energy**

*Project Name*

**Training Plan**

*September 2002*

# TEMPLATE

**U. S. DEPARTMENT OF ENERGY**

*Organizational Title 1*

*Organizational Title 2*

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U.S. DEPARTMENT OF ENERGY

*Organizational Title 1*  
*Organizational Title 1*

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# Preface

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**Document Version Control:** It is the reader's responsibility to ensure they have the latest version of this document. Questions should be directed to the owner of this document, or the project manager.

This document was generated by the **Project Name** project team. **System/Project Name** will be developed for the **Organizational** Name of the U.S. Department of Energy.

**Lifecycle Stage:** **Project Name** is in the Programming stage of the project lifecycle.

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## Privacy Information

This document may contain information of a sensitive nature. This information should not be given to persons other than those who are involved in the **Project Name** project or who will become involved during the lifecycle.

# 1. Introduction

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Describe the purpose of the training plan, and the organization of the document.

## 1.1 Scope

Describe the project and/or organizational boundaries of the training, such as initial training for system users, remedial training for the system maintenance staff, etc.

## 1.2 Objectives

Describe the objectives or expected results of the training. Express objectives as actions that the users will be expected to perform once they have been trained. A course outline may also be included. Reference Appendix A for example course outline.

## 1.3 Background

Provide a general description of the system, and an overview of the training curriculum.

## 1.4 References

Identify sources of information used to develop this document, such as IEEE or project documentation.

## **2. Training Requirements**

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Describe the general work environment (including equipment), and the skills for which training is required (management, business, technology, etc). The training audience should also be identified (category of user: upper management, system administrator, administrative assistant, etc.). It may also identify individuals or positions needing specific training. Include the time frame in which training must be accomplished.

### **2.1 Roles and Responsibilities**

Identify the roles and responsibilities of the training staff, such as management of the training development and implementation; course presenters/ instructors; development and distribution of instructional materials, etc. It may also include the identification of other groups who may serve as consultants, such as members of the development team, experienced users, etc.

Note: Information for this section (2.1 Roles and Responsibilities) may appear in the system's overall Work Breakdown Structure (WBS), which is typically appended to or associated with the system's Project Plan. If so, simply reference the system's WBS, or append the WBS to this document.

### **2.2 Training Evaluation**

The effectiveness of training must continually be evaluated. Describe how training evaluation will be performed. Evaluation tools, forms, etc., should be included. Also describe the revision process with regard to the modification of the course and course materials resulting from the evaluations.

### **3. Training Strategy**

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Describe the type of training (e.g., classroom, CBT, etc.); and the training schedule (duration, sites, and dates). Longer lead times may be required for scheduling field site training. Some factors may include: adequacy of training facilities; accommodations; need to install system files; modem/communication issues; physical access to buildings, escorts needed within facilities, etc. Some of the aforementioned areas may also need to be addressed when training is performed locally (non-field training).

Note: It is suggested that a training log be developed to document and track information associated with individuals receiving training. Reference Appendix B for example training log.

#### **3.1 Training Sources**

Identify the source or provider for the training. Training may be internal (course developed in-house) or external (contracted to external training agencies).

#### **3.2 Pilot Class**

Once the training is developed, it should be presented to a test group that may include the training manager and staff, members of the development team, key users, representative members of the target audience, etc. The training is then revised based on recommendations from the pilot audience. Provide details about the proposed pilot class (audience, location, date, etc.).

#### **3.3 Dependencies/Constraints/Limitations**

Identify all known dependencies constraints, and or limitations that could potentially affect training on the project.



## 4. Training Resources

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Identify all of the essential resources known to be associated with the specified training. This should include hardware/software, instructor availability, training time estimates, projected level of effort, system documentation, and other resources required to familiarize the trainer with the system, produce training materials, and provide the actual training. The identification and availability of other resource groups (as referenced in section 2.1 Roles and Responsibilities) should also be included.

## 5. Training Environment

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Describe the equipment and conditions required for the training, including installations, facilities, and special databases (typically should be a separate, independent development/production environment. Also identify any actions required by other groups, such as users, to ensure all equipment is in place and specified conditions are met before the training.

## 6. Training Materials

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Describes the types of training materials required for the training. The training materials developed may include visuals for overhead projectors, handouts, workbooks, manuals, computerized displays, and demonstrations.

Note: Training manuals or workbooks differ from the user manual. They are tutorial in nature and follow a functional, work flow approach to learning the system with a strong focus on "hands-on" exercises and examples.

During the development of training materials, it is helpful to identify at least one expert in the user community who can assist the trainer by describing the user environment and work flow and answering questions.

The training materials and curriculum should accurately reflect the system. Users should also be introduced to the user manual so they can use it as a learning and reference tool.

An instructor guide should also be developed. The guide is particularly useful after the initial training is completed, since subsequent training may occur at infrequent intervals.

### 6.1 Update/Revise Training Materials

Once training materials are developed and pilot-tested, they must be subjected to the same kind of configuration management process as the other system documentation. Training materials should remain current with system enhancements. To accomplish this, the training team should be included in distributions of release changes and provided sufficient time to update training materials before the next scheduled user training. Describe the change release process with regard to the training team, and how training materials will be kept updated.

## Appendix A

### Example Course Outline

#### Course Outline

The training outline should list the training objectives and the training content. Note: Training will vary considerably depending upon the training objectives and the system structure. When the course outline has been approved, course development should begin. A sample training outline for a 1-day classroom training follows.

**OBJECTIVES:** Upon completion of the training, students will be able to accomplish the following.

1. Access the system.
2. Query the system.
3. Generate reports.

**DURATION:** 1-day session from 9:30 a.m. to 4:30 p.m.

**MORNING SESSION:**

- System Overview
- Log on, Log off
- Special Keys
- Edits and Error Messages
- Menus and Options
- Work Flow Function 1 (repeat for other functions)
  - What the function does
  - Special functions unique to this option
  - Exercise - Use the function

**AFTERNOON SESSION:**

- Function 2
- Function 3
- Special Features
- Summary and/or Workshop Session(s)
- Question and Answers
- Evaluation

## Appendix B

### Example Training Log

#### Training Log

Trainee Name	Date	Location	Description of Training	No. Hours	ID #	Comments